

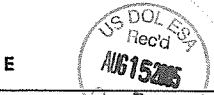
FORM LM-30

LABOR ORGANIZATION OFFICER AND EMPLOYEE REPORT

Form approved
Office of Management
and Budget
No. 1215-0188
Expires 11-30-2006

This report is mandatory under P.L. 86-257, as amended. Failure to comply may result in criminal prosecution, fines, or civil penalties as provided by 29 U.S.C 439 or 440.

For Official Use Only



READ THE INSTRUCTIONS CAREFULLY BEFORE PREPARING THIS REPORT.

1. File Number U- <u>162</u>	2. Fiscal Year Covered From: <u>1</u> / <u>1</u> / <u>2004</u> Through: <u>12</u> / <u>31</u> / <u>2004</u>
3. Name and address of person filing. Name <u>William</u> <u>J</u> <u>Boarman</u> P.O. Box, Bldg., Room No., if any <u></u> Street <u>501 3rd Street NW</u> City <u>Washington</u> State <u>District of Columbia</u> ZIP Code + 4 <u>20001</u>	4. Name, file number, and address of labor organization. Name <u>Communications Workers of America</u> Labor Organization File Number <u>000-188</u> P.O. Box, Building and Room Number, if any <u></u> Street <u>501 3rd Street NW</u> City <u>Washington</u> State <u>District of Columbia</u> ZIP Code + 4 <u>20001</u>
5. Position in labor organization. <u></u>	

Enter appropriate data below if, during the past fiscal year, you or your spouse or minor child directly or indirectly had any of the following interests (except as specified in the exclusions set forth in the instructions):

A. Held an interest in, engaged in transactions (including loans) with, or derived income or other economic benefit of monetary value from an employer whose employees your organization represents or is actively seeking to represent.	
6. Name and address of Employer (including trade name, if any). Name <u></u> Trade Name, if any: <u></u> P.O. Box, Bldg., Room No., if any <u></u> Street <u></u> City <u></u> State <u></u> ZIP Code + 4 <u></u>	7.a. Nature of Interest, Transaction, or Income. <u></u> 7.b. Amount. <u></u>

Signature

15. Signature and verification. The undersigned declares, under penalty of Perjury and other applicable penalties of the law, that all of the information submitted in this report (including the information contained in any accompanying documents), has been examined by the signatory and is, to the best of the undersigned's knowledge and belief, true, correct, and complete. (See the section on penalties in the instructions.)		
Signed <u>Wm. J. Boarman</u>	On <u>08-09-05</u> Date	<u>202-434-1235</u> Telephone Number

Name of Person Filing William Boardman	File Number U-
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B. Held an interest in or derived income or economic benefit with monetary value from a business (1) a substantial part of which consists of buying from, selling or leasing to, or otherwise dealing with the business of an employer whose employees your labor organization represents or is actively seeking to represent, or (2) any part of which consists of buying from or selling or leasing directly or indirectly to, or otherwise dealing with your labor organization or with a trust in which your labor organization is interested.

<p>8. Name and address of Business (including trade name, if any).</p> <p>Name <u>Bryan Cave LLP</u></p> <p>Trade Name, if any: <u></u></p> <p>P.O. Box, Bldg., Room No., if any <u></u></p> <p>Street <u>1290 Avenue of the Americas</u></p> <p>City <u>New York</u></p> <p>State <u>New York</u> ZIP Code + 4 <u>10104</u></p>	<p>9. Business deals with:</p> <p><input type="checkbox"/> a. Labor Organization</p> <p><input checked="" type="checkbox"/> b. Trust</p> <p><input type="checkbox"/> c. Employer</p>
<p>10. If 9.b. or 9.c. is checked give trust or employer's name.</p> <p>Name <u>CWA/ITU Negotiated Pension Plan</u></p> <p>Trade Name, if any: <u></u></p> <p>P.O. Box, Bldg., Room No., if any <u>Suite 120</u></p> <p>Street <u>831 South Nevada Avenue</u></p> <p>City <u>Colorado Springs</u></p> <p>State <u>Colorado</u> ZIP Code + 4 <u>80903</u></p>	<p>11.a. Nature of such dealing.</p> <p>In 2004, as it has done for over thirty years, the law firm provided legal services to the fund and one of the partners in the firm served as General Counsel to the fund.</p> <p>11.b. Approximate dollar value of such dealing. <u>\$170,000</u></p> <p>12.a. Nature of interest held or income received.</p> <p>Three tickets to a Broadway show, one of which I used and the other two I gave away. Upon learning subsequently that the firm had paid for the tickets and that they had cost \$900, I reimbursed the firm for the three tickets.</p> <p>12.b. Amount. <u>\$900</u></p>

<p>C. Received from any employer (other than an employer covered under parts A and B above) or from any labor relations consultant to an employer any payment of money or other thing of value.</p>	
<p>13.a. Name and address of Employer or Labor Relations Consultant (including trade name, if any).</p> <p>Name <u></u></p> <p>Trade Name, if any: <u></u></p> <p>P.O. Box, Bldg., Room No., if any <u></u></p> <p>Street <u></u></p> <p>City <u></u></p> <p>State <u></u> ZIP Code + 4 <u></u></p>	<p>14.a. Nature of payment.</p> <p><u></u></p>
<p>13.b. Is the Business an Employer <input type="checkbox"/> or Consultant <input type="checkbox"/> ?</p>	<p>14.b. Amount of payment. <u></u></p>

Name of Person Filing William Boarman

File Number U-

Part B Continuation Page

B. Held an interest in or derived income or economic benefit with monetary value from a business (1) a substantial part of which consists of buying from, selling or leasing to, or otherwise dealing with the business of an employer whose employees your labor organization represents or is actively seeking to represent, or (2) any part of which consists of buying from or selling or leasing directly or indirectly to, or otherwise dealing with your labor organization or with a trust in which your labor organization is interested.

8. Name and address of Business (including trade name, if any). Name ASB Capital Management Trade Name, if any: P.O. Box, Bldg., Room No., if any Street 1919 M Street NW City Washington State District of Columbia ZIP Code + 4 20036	9. Business deals with: <input type="checkbox"/> a. Labor Organization <input checked="" type="checkbox"/> b. Trust <input type="checkbox"/> c. Employer
10. If 9.b. or 9.c. is checked give trust or employer's name. Name CWA/ITU Negotiated Pension Plan Trade Name, if any: P.O. Box, Bldg., Room No., if any Suite 120 Street 831 South Nevada Avenue City Colorado Springs State Colorado ZIP Code + 4 80903	11.a. Nature of such dealing. Business provides investment advice and manages a real estate portfolio for the named trust.
	11.b. Approximate dollar value of such dealing. \$224,000 12.a. Nature of interest held or income received. Three business lunches worth \$170.64 total and a \$25 ticket to a boat show. 12.b. Amount. \$196

Name of Person Filing William Boarman	File Number U-
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B. Held an interest in or derived income or economic benefit with monetary value **from a business** (1) a substantial part of which consists of buying from, selling or leasing to, or otherwise dealing with the business of an employer whose employees your labor organization represents or is actively seeking to represent, or (2) any part of which consists of buying from or selling or leasing directly or indirectly to, or otherwise dealing with your labor organization or with a trust in which your labor organization is interested.

<p>8. Name and address of Business (including trade name, if any).</p> <p>Name Mackey Shields</p> <p>Trade Name, if any:</p> <p>P.O. Box, Bldg., Room No., if any</p> <p>Street 9 West 57th Street</p> <p>City New York</p> <p>State New York ZIP Code + 4 10019</p>	<p>9. Business deals with:</p> <p><input type="checkbox"/> a. Labor Organization</p> <p><input checked="" type="checkbox"/> b. Trust</p> <p><input type="checkbox"/> c. Employer</p>
<p>10. If 9.b. or 9.c. is checked give trust or employer's name.</p> <p>Name CWA/ITU NPP</p> <p>Trade Name, if any:</p> <p>P.O. Box, Bldg., Room No., if any Suite 120</p> <p>Street 931 S. Nevada Ave.</p> <p>City Colorado Springs</p> <p>State Colorado ZIP Code + 4 80903</p>	<p>11.a. Nature of such dealing.</p> <p>Business provided investment advice and investmnet managemnet services to the named trust and no fees were cahrged in 2004.</p> <p>11.b. Approximate dollar value of such dealing. \$0</p> <p>12.a. Nature of interest held or income received.</p> <p>Dinner meeting to review investment products and introduce investmnet sles personnel to co-officers and dinner was followed by basketball game. (\$221.) Meeting at union HQ to review performance of hedge fund product followed by lunch. (\$63.02).</p> <p>12.b. Amount. \$284</p>

<p>C. Received from any employer (other than an employer covered under parts A and B above) or from any labor relations consultant to an employer any payment of money or other thing of value.</p>	
<p>13.a. Name and address of Employer or Labor Relations Consultant (including trade name, if any).</p> <p>Name</p> <p>Trade Name, if any:</p> <p>P.O. Box, Bldg., Room No., if any</p> <p>Street</p> <p>City</p> <p>State ZIP Code + 4</p>	<p>14.a. Nature of payment.</p>
<p>13.b. Is the Business an Employer <input type="checkbox"/> or Consultant <input type="checkbox"/> ?</p>	<p>14.b. Amount of payment.</p>

Name of Person Filing William Boarman

File Number U-

Part B Continuation Page

B. Held an interest in or derived income or economic benefit with monetary value from a business (1) a substantial part of which consists of buying from, selling or leasing to, or otherwise dealing with the business of an employer whose employees your labor organization represents or is actively seeking to represent, or (2) any part of which consists of buying from or selling or leasing directly or indirectly to, or otherwise dealing with your labor organization or with a trust in which your labor organization is interested.

8. Name and address of Business (including trade name, if any).

Name Calibre CPA Group
Trade Name, if any:
P.O. Box, Bldg., Room No., if any
Street 1850 K Street NW
City Washington
State District of Columbia ZIP Code + 4 20006

9. Business deals with:

- ☒ a. Labor Organization
☐ b. Trust
☐ c. Employer

10. If 9.b. or 9.c. is checked give trust or employer's name.

Name
Trade Name, if any:
P.O. Box, Bldg., Room No., if any
Street
City
State ZIP Code + 4

11.a. Nature of such dealing.

CPA firm performs professional services for the union.

11.b. Approximate dollar value of such dealing.

\$6,000

12.a. Nature of interest held or income received.

Business lunch meeting.

12.b. Amount.

\$71

Name of Person Filing William Boarman

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Part B Continuation Page

B. Held an interest in or derived income or economic benefit with monetary value from a business (1) a substantial part of which consists of buying from, selling or leasing to, or otherwise dealing with the business of an employer whose employees your labor organization represents or is actively seeking to represent, or (2) any part of which consists of buying from or selling or leasing directly or indirectly to, or otherwise dealing with your labor organization or with a trust in which your labor organization is interested.

8. Name and address of Business (including trade name, if any).

Name CWA/ITU Negotiated Pension Plan

Trade Name, if any:

P.O. Box, Bldg., Room No., if any Suite 120

Street 831 South Nevada Avenue

City Colorado Springs

State Colorado ZIP Code + 4 80903

9. Business deals with:

☒ a. Labor Organization

☐ b. Trust

☐ c. Employer

10. If 9.b. or 9.c. is checked give trust or employer's name.

Name

Trade Name, if any:

P.O. Box, Bldg., Room No., if any

Street

City

State ZIP Code + 4

11.a. Nature of such dealing.

Trust provides retirement benefits to CWA members, worth \$22 m in 2004.

11.b. Approximate dollar value of such dealing.

12.a. Nature of interest held or income received.

Reimbursements for travel, hotel, meals, and miscellaneous expenses for attending Board meetings on 4/18, 7/31-8/3, and 12/3.

12.b. Amount.

\$1,692

Name of Person Filing William Boarman

File Number U-

Part B Continuation Page

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8. Name and address of Business (including trade name, if any).

Name Congress Asset Management

Trade Name, if any:

P.O. Box, Bldg., Room No., if any

Street 2 Seaport Lane

City Boston

State Massachusetts

ZIP Code + 4 02210

9. Business deals with:

☐ a. Labor Organization☒ b. Trust☐ c. Employer

10. If 9.b. or 9.c. is checked give trust or employer's name.

Name CWA/ITU Negotiated Pension Plan

Trade Name, if any:

P.O. Box, Bldg., Room No., if any Suite 120

Street 831 South Nevada Avenue

City Colorado Springs

State Colorado

ZIP Code + 4 80903

11.a. Nature of such dealing.

Business provides investment management services for a private equity investment for the named fund.

11.b. Approximate dollar value of such dealing.

\$192,500

12.a. Nature of interest held or income received.

A reception for trust staff, trustees, and advisors, money managers, and others not employed by the trust, which my wife and I attended.

12.b. Amount.

\$40

Name of Person Filing William Boarman	File Number U-
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B. Held an interest in or derived income or economic benefit with monetary value from a business (1) a substantial part of which consists of buying from, selling or leasing to, or otherwise dealing with the business of an employer whose employees your labor organization represents or is actively seeking to represent, or (2) any part of which consists of buying from or selling or leasing directly or indirectly to, or otherwise dealing with your labor organization or with a trust in which your labor organization is interested.

<p>8. Name and address of Business (including trade name, if any).</p> <p>Name Amalgamated Bank</p> <p>Trade Name, if any:</p> <p>P.O. Box, Bldg., Room No., if any</p> <p>Street 1825 K Street N.W></p> <p>City Washington</p> <p>State District of Columbia ZIP Code + 4 20006</p>	<p>9. Business deals with:</p> <p><input type="checkbox"/> a. Labor Organization</p> <p><input checked="" type="checkbox"/> b. Trust</p> <p><input type="checkbox"/> c. Employer</p>
<p>10. If 9.b. or 9.c. is checked give trust or employer's name.</p> <p>Name CWA/ITU Negotiated Pension Plan</p> <p>Trade Name, if any:</p> <p>P.O. Box, Bldg., Room No., if any Suite 120</p> <p>Street 831 South Nevada Avenue</p> <p>City Colorado Springs</p> <p>State Colorado ZIP Code + 4 80903</p>	<p>11.a. Nature of such dealing.</p> <p>Provides banking and invetment advise for the named fund with two investment products.</p> <p>11.b. Approximate dollar value of such dealing. \$99,000</p> <p>12.a. Nature of interest held or income received.</p> <p>Four baseball tickest and a holiday gift of a small promotional balnket.</p> <p>12.b. Amount. \$198</p>

<p>C. Received from any employer (other than an employer covered under parts A and B above) or from any labor relations consultant to an employer any payment of money or other thing of value.</p>	
<p>13.a. Name and address of Employer or Labor Relations Consultant (including trade name, if any).</p> <p>Name</p> <p>Trade Name, if any:</p> <p>P.O. Box, Bldg., Room No., if any</p> <p>Street</p> <p>City</p> <p>State ZIP Code + 4</p>	<p>14.a. Nature of payment.</p>
<p>13.b. Is the Business an Employer <input type="checkbox"/> or Consultant <input type="checkbox"/> ?</p>	<p>14.b. Amount of payment.</p>

Name of Person Filing William Boarman

File Number U-

Part B Continuation Page

B. Held an interest in or derived income or economic benefit with monetary value from a business (1) a substantial part of which consists of buying from, selling or leasing to, or otherwise dealing with the business of an employer whose employees your labor organization represents or is actively seeking to represent, or (2) any part of which consists of buying from or selling or leasing directly or indirectly to, or otherwise dealing with your labor organization or with a trust in which your labor organization is interested.

8. Name and address of Business (including trade name, if any).

Name Loomis, Sayles & Company

Trade Name, if any:

P.O. Box, Bldg., Room No., if any

Street 39533 North Woodward Avenue 5300

City Bloomfield Hills

State Michigan ZIP Code + 4 48304

9. Business deals with:

☐ a. Labor Organization

☒ b. Trust

☐ c. Employer

10. If 9.b. or 9.c. is checked give trust or employer's name.

Name CWA/ITU Negotiated Pension Plan

Trade Name, if any:

P.O. Box, Bldg., Room No., if any Suite 120

Street 831 South Nevada Avenue

City Colorado Springs

State Colorado ZIP Code + 4 80903

11.a. Nature of such dealing.

Business provides investment advice and manages several different kinds of investment products for the named fund.

11.b. Approximate dollar value of such dealing.

\$596,767

12.a. Nature of interest held or income received.

Three dinners, two of which my wife attended, and one of which my son attended, at which the performance of the company's various investment products was discussed.

12.b. Amount.

\$371

Name of Person Filing William Boarman	File Number U-
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B. Held an interest in or derived income or economic benefit with monetary value from a business (1) a substantial part of which consists of buying from, selling or leasing to, or otherwise dealing with the business of an employer whose employees your labor organization represents or is actively seeking to represent, or (2) any part of which consists of buying from or selling or leasing directly or indirectly to, or otherwise dealing with your labor organization or with a trust in which your labor organization is interested.

<p>8. Name and address of Business (including trade name, if any).</p> <p>Name <input type="text" value="GESD Capital Partners"/></p> <p>Trade Name, if any: <input type="text"/></p> <p>P.O. Box, Bldg., Room No., if any <input type="text"/></p> <p>Street <input type="text" value="221 Main Street, Suite 1450"/></p> <p>City <input type="text" value="San Francisco"/></p> <p>State <input type="text" value="California"/> ZIP Code + 4 <input type="text" value="94105"/></p>	<p>9. Business deals with:</p> <p><input type="checkbox"/> a. Labor Organization</p> <p><input checked="" type="checkbox"/> b. Trust</p> <p><input type="checkbox"/> c. Employer</p>
<p>10. If 9.b. or 9.c. is checked give trust or employer's name.</p> <p>Name <input type="text" value="CWA/ITU NPP"/></p> <p>Trade Name, if any: <input type="text"/></p> <p>P.O. Box, Bldg., Room No., if any <input type="text" value="Suite 120"/></p> <p>Street <input type="text" value="931 S. Nevada Ave."/></p> <p>City <input type="text" value="Colorado Springs"/></p> <p>State <input type="text" value="Colorado"/> ZIP Code + 4 <input type="text" value="80903"/></p>	<p>11.a. Nature of such dealing.</p> <p><input type="text" value="Business provided investment advice and investmnet managemnet services to the named trust for a private Equity Investmnet"/></p> <p>11.b. Approximate dollar value of such dealing. <input type="text" value="\$165,000"/></p> <p>12.a. Nature of interest held or income received.</p> <p><input type="text" value="Holiday Gift Basket for the office employees (8)."/></p> <p>12.b. Amount. <input type="text" value="\$147"/></p>

C. Received from any employer (other than an employer covered under parts A and B above) or from any labor relations consultant to an employer any payment of money or other thing of value.

<p>13.a. Name and address of Employer or Labor Relations Consultant (including trade name, if any).</p> <p>Name <input type="text"/></p> <p>Trade Name, if any: <input type="text"/></p> <p>P.O. Box, Bldg., Room No., if any <input type="text"/></p> <p>Street <input type="text"/></p> <p>City <input type="text"/></p> <p>State <input type="text"/> ZIP Code + 4 <input type="text"/></p>	<p>14.a. Nature of payment.</p> <p><input type="text"/></p>
<p>13.b. Is the Business an Employer <input type="checkbox"/> or Consultant <input type="checkbox"/> ?</p>	<p>14.b. Amount of payment.</p> <p><input type="text"/></p>